99 00709

GREAT THINKING

GREAT LIVING

The San Francisco Bay Area

NINE-COUNTY REGION *San Francisco—Oakland—San Jose—Silicon Valley*

Alameda-Contra Costa-Marin-Napa-San Francisco-San Mateo-Santa Clara-Solano-Sonoma

GREAT PLACE TO DO BUSINESS

INSTITUTE OF GOVERNMENTAL STUDIES LIBRARY
MAR 7 1995
UNIVERSITY OF CALIFORNIA

Photo: NASA Ames Research Center

The Nine-County San Francisco Bay Area

One of the World's Great Regional Economies...

The Bay Area is a $200 BILLION ANNUAL ECONOMY — Ranking 20th in the World.

The regional economy is powered by its national and international leadership in: Information Technology; Digital Media and Telecommunications; Bioscience; Environmental Technology; Finance and Business Services; and High-Tech Exports.

The Bay Area's success is generated by its creativity. Because it is the kind of place that attracts bright, talented people, the region is a major center for: Film and TV Production; Engineering and Architecture; and Apparel and Design.

The Bay Area is internationally acclaimed as a Premium Wine Producer and as one of the world's most popular Tourist Destinations.

And there is so much more...

- The highest percentage of fastest-growing small businesses in the country.
- The nation's largest aggregation of research universities and federal research laboratories.
- The highest Internet penetration of any U.S. region.
- The country's largest share of college and advanced degrees.
- The worldwide capital of knowledge-based industries.
- The Venture Capital "Capital" of the World.
- The cutting-edge of emerging technologies.
- The premier location for businesses who are leaders in their fields.

99 00709
(1)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

Key Industries: COMPUTERS, ELECTRONICS AND HIGH TECHNOLOGY

The San Francisco Bay Area is home to many of the most ***innovative*** and ***fast-growing*** computer, electronics, and high technology companies in the world. (McKinsey & Company report, *The Bay Area: Leading the Transition to a Knowledge-Based Economy*, August 1996)

Computers and electronics comprise a uniquely strong industry cluster in the Bay Area, with the second highest ***productivity*** and the highest ***employment concentration*** among comparative regions.

More than 50% (13 out of 24) of the Bay Area's 1997 Fortune 500 companies are in knowledge-based sectors, e.g., computers, electronics, telecommunication, multimedia, etc. (McKinsey & Company, 1998)

Bay Area Companies are:

- Among the preeminent database software developers in the world, holding over 75 percent of the market share in one of the fastest growing corporate software markets.
- Prominent players in the world's computer architecture market and likely will be the foundation for future growth.

The region is the global center for high performing networking equipment companies, and the development of e-commerce.

SOME OF THE BAY AREA'S HIGH TECHNOLOGY FIRMS

Adobe
Advanced Micro Devices
Amdahl Corporation
Apple Computer
Applied Materials Inc.
Ascend
Autodesk
Cadence Design
Cisco Systems
Collabra
Hewlett-Packard Company
Hitachi Semiconductor (America), Inc.
IBM
Intel
Intuit
Lam Research Corporation
Lockheed Martin
LSI Logic
National Semiconductor Corporation
Netcom
Netscape
Oracle Systems
Quantum
Raychem
Seagate Technology
Silicon Graphics
Solectron
Sun Microsystems
Sybase
Symantec
Tandem Computers
3Com
Varian Associates
Yahoo! Inc.

Additional information on the strength of the industry in the Bay Area

- *Highest employment in the nation:* The Bay Area computer and electronics industry has a higher employment concentration than any other metropolitan region. The 1997-1998 employment growth rate was around 9%.

- *Strongest productivity growth in the nation:* The region also enjoys the strongest productivity growth compared to other U.S. metropolitan regions in this sector. Output per employee grew 7.5% from 1997 to 1998.

- *Part of the Bay Area's "knowledge-based" economy:* The computer and electronics industry is one of several industry sectors that leverage the Bay Area's strong knowledge base. With more top-ranked graduate programs in 1997 (55) than any other U.S. metropolitan region, and more 1997 patents (5,900) than Boston, Houston, Phoenix and Seattle combined, the Bay Area boasts an unparalleled knowledge infrastructure. (McKinsey & Company, 1998)

- *The Bay Area's Silicon Valley,* the *worldwide center of high technology,* has the highest concentration of technology-oriented firms and professionals found anywhere, and leads the world in development of pioneering technologies.

99 00709
(2)

BAY AREA
MARKETING
PARTNERSHIP
THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

Key Industries: BIOSCIENCES

The Bay Area is home to one of the country's largest communities of bioscience companies—including biotechnology, medical devices and pharmaceuticals—totalling almost ***1,000*** firms and research institutions.

Most ***industry pioneers***, as well as new ***leading-edge companies***, are headquartered here.

The birthplace of biotechnology, the Bay Area remains the ***world leader*** in bioscience research, and industries related to:

- Therapies
- Diagnostics
- Industrial Enzymes.

TEN LARGEST BIOSCIENCE FIRMS IN THE BAY AREA

Genentech, Inc.

Chiron Corp.

Bayer Corp.

ALZA Corp.

Bio-Rad Laboratories, Inc.

Incyte Pharmaceuticals, Inc.

Elan Pharmaceuticals, Inc.

Siemens Medical Systems, Inc.

Gilead Sciences, Inc.

CLONTECH Laboratories, Inc.

(San Francisco Business Times, *1999 Book of Lists*)

STRENGTH OF THE BIOSCIENCE INDUSTRY IN THE BAY AREA

The Bay Area accounts for an estimated. . .

- *24% of product sales*
- *29% of total revenues*
- *36% of all research and development expenditures*

. . . in the United States, according to a 1998 report on public U.S. biotechnology firms. This does not include medical device firms, a major bioscience industry sector in which the Bay Area has a clear leadership position. (Ernst & Young 1998)

The Bay Area is noted for:

- *Strong research investment:* Bay Area companies continue to heavily invest in research. The region's bioscience R&D spending per company leads Los Angeles, New England, Seattle and Texas combined. (McKinsey & Company 1998)

- *Magnet for global intellectual capital:* Outstanding educational institutions attract and develop knowledge-intensive talent for the Bay Area economy. Companies have made full use of this intellectual capital. Across two representative bioscience companies, more than 60% of scientists were educated at Bay Area institutions. (McKinsey & Company, 1998)

The Bay Area's research institutions have been at the heart of some of the most significant breakthroughs of the last 25 years. Many Bay Area companies and research organizations are at the frontiers of medical science, working on cures for AIDS, cancer, heart disease, genetic diseases such as multiple sclerosis and cystic fibrosis, and debilitating conditions like Alzheimer's and arthritis. (McKinsey & Company report, *The Bay Area: Leading the Transition to a Knowledge-Based Economy*, August 1996)

99 90709
(3)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

Key Industries: MULTIMEDIA/INTERACTIVE DIGITAL

The San Francisco Bay Area, the birthplace of the multimedia revolution, continues as the ***preeminent global center*** of this creative and exciting industry.

Multimedia, an interactive digital technology that integrates text, graphics sound, and the world-wide web, has dramatic implications for the ways we communicate.

The Bay Area's unique convergence of ***culture, creativity*** and ***technology*** will ensure that the industry's ***exponential growth*** in the region continues well into the 21st Century.

The Bay Area has more than 30% of the nation's multimedia firms.

Multimedia Gulch, in San Francisco:

- *Is home to more than 400 interactive media firms*
- *Leads the world in cutting-edge multimedia technology and development*

TEN LARGEST MULTIMEDIA FIRMS IN THE BAY AREA

Electronic Arts
Macromedia, Inc.
The 3DO Co.
IMSI
Organic
Imagine Media
Crystal Dynamics
Studio Archetype
Kinetix
Berkeley Systems

(San Francisco Business Times, *1999 Book of Lists*)

The Bay Area: The Multimedia Capital

The Bay Area brings together a unique combination of all the key elements of the industry – technology, content, creativity and ability.

With the dramatic growth of the Internet, the World Wide Web, and e-commerce, the Bay Area is well positioned for continued growth in this industry cluster. (McKinsey & Company report, *The Bay Area: Leading the Transition to a Knowledge-Based Economy*, August 1996)

To assist in solidifying the region's position as the multimedia capital, the Bay Area Economic Forum's program, the ***Bay Area Multimedia Partnership (BAMP)*** focuses on the development of a skilled and trained multimedia workforce. BAMP has co-developed ***SkillsNet*** (www.skillsnet.net), a website that serves as an information resource and clearinghouse for industry, educators and jobseekers.

From innovative games to corporate on-line communication; from cutting-edge technology to artistic innovation; from the opportunities of networking with other industry workers to gaining access to highly-rated educational facilities, the region is a booming center for this new media.

99 00709
(4)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

Key Industries: TELECOMMUNICATIONS

The Bay Area is home to many large, **innovative telecommunications** and **information** companies that provide an exciting platform for advanced technologies:

- *Wireless communications*
- *High-speed digital data transmission*
- *Cable and satellite television*
- *Two-way radio paging*

The ***deregulation*** of local telephone service, dramatic innovations in the wireless business, and increasing ***competition*** are all leading to lower telecommunications costs, and bringing new products and services to the Bay Area. *(McKinsey & Company report, The Bay Area: Leading the Transition to a Knowledge-Based Economy, August 1996)*

Some Bay Area Telecommunications Firms

AT&T
AirTouch
Apple Computer
Hewlett-Packard
Intel
GTE
Lucent Technologies
MCI
Netscape
Oracle Systems
Pacific Telesis Group
SBC Communications
Sun Microsystems
TCI
Viacom Cable

Additional information on the strength of the industry in the Bay Area

Competition and innovation

As traditional telecommunications converges with information technologies, the Bay Area is once again in the vanguard of new developments.

Together with numerous fiber-optic and wireless networks that lace the region, new digital switching and transmission technologies now being deployed will provide the platform for a host of exciting communications advances, such as:

- *Wireless personal communicators programmed to indicate calls from home or office*
- *Interactive TV systems connecting sites that shop, videoconference and play interactive games*
- *Cellular networks for data and voice transmission, linking portable computers, fax machines, and telephones*
- *Full-motion, two-way color video conferencing using personal computers and existing phone lines*
- *The next generation of cable TV services, with local, satellite, and long-distance telephone companies*
- *Internet access through local telephone, long-distance, cable, cellular, and personal communications companies*
- *Education via interaction with teachers, scholars, and experts from around the globe.*

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

Key Industries:
FILM & TELEVISION PRODUCTION

With one of the nation's most photogenic settings and a concentration of talent in fields straddling creativity and visual technology, the Bay Area *is well positioned to lead the revolution* in film and television production technology.

The Bay Area boasts:

- *A wealth of creativity and technology*
- *Strength in animation and digital editing*
- *Superb views of city skylines, bridges, bay and ocean shoreline, hills and open space*
- *Numerous shooting locations, including former military bases featuring flexible, unobstructed interior facilities in huge hangars and warehouses with up to 70-foot ceiling clearances*

The region's notable companies include:

- *Lucasfilm, one of the leading film and entertainment companies in the world. The Lucas group includes Lucas Arts, Lucas Digital, Industrial Light & Magic, and Skywalker Sound.*
- *Pixar, a world-class animation studio headed by Steve Jobs*

OTHER IMPORTANT FILM AND TELEVISION PRODUCTION COMPANIES

Colossal Pictures
MGP
Manex Entertainment, Ltd.
Monaco Film Labs & Video Services
Mondo Media
Pacific Data Images
Saul Zaentz Film Center
Tippett Studios
Twitching Image
KGO, KPIX, KQED, KRON, KTVU

Creative, High-Tech Talent

The Bay Area is home to a growing pool of ***talented, skilled workers*** and ***suppliers*** specializing in:

- *Graphics*
- *Film processing*
- *Content development*
- *Arts*
- *Technology*
- *Distribution*

Top directors and producers such as Franics Ford Coppola, George Lucas and Barry Levinson, along with ***actors*** Robin Williams, Sharon Stone, Sean Penn and Danny Glover, live and work in the Bay Area.

Former Military Bases – New Location Opportunities

The Bay Area's former military bases offer a spectacular new opportunity for film and television production. Former bases being used extensively for shooting include: ***Hunters Point Shipyard***, the ***Presidio***, and ***Treasure Island*** in ***San Francisco***; ***Alameda Point*** in ***Alameda***, and ***Vallejo's Mare Island***.

These bases have already hosted scores of television and feature film productions including: *Mrs. Doubtfire, Phenomenon, The Game, The Rainmaker, Nine Months, Jack, Copycat, Metro, Sphere, JAG* and *Nash Bridges*.

Film Commissions

County of Alameda
Cable TV Franchise Authority
Ms. Lou Ann Texeira, (510) 208-3996

Contra Costa Convention & Visitors Bureau
Ms. Erin Reid, (925) 685-1184

Napa County Film Commission
Ms. Jane Hinshaw, (707) 253-4821

San Francisco Film & Video Arts Commission
Ms. Carole Isaacs, (415) 554-6244

San Mateo County Convention & Visitors Bureau
Ms. Juda Tolmasoff, (650) 348-7600

Tri-Valley Film & Video Commission
Ms. Alison Levelis, (925) 846-8910

Berkeley Convention & Visitors Bureau
Film Commission
Ms. Barbara Hillman, (510) 549-7040

Marin County Convention & Visitors Bureau
Ms. Barbara Blum, (415) 499-3252

Oakland Film Commission
Ms. Ami Zins, (510) 238-4734

San Jose Convention & Visitors Bureau
Film & Video Marketing
Mr. Joe O'Kane, (800) SAN JOSE

Sonoma County Economic Development Board
Film Commission
Ms. Catherine DePrima, (707) 524-7347

Vallejo/Solano County Film Commission
Mr. Jim Reikowsky, (707) 642-3653

99 00709
(6)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

Key Industries:
VENTURE CAPITAL

The nine-county Bay Area has the highest density of venture capital firms in the world. It's the *venture capital "Capital".*

The Bay Area:

- *Has more fast-growing private companies than any comparative region.*
- *Attracts 35% of the venture capital invested in the United States, although it represents only 2% of the population.*
- *Posted the strongest shareholder returns in medium and large sized companies, well above the average returns of the S&P 500.*
- *VC investments grew by 162% from 1994 to 1997, with knowledge-intensive industries showing triple-digit growth in invested funds.*

(McKinsey & Co.)

Ten Largest Venture Capital Firms in the Bay Area

Firm	Total Capital Invested in 1997 (In Millions)
Summit Partners	275
TA Associates	166
Mayfield Fund	155
Oak Investment Partners	129
Kleiner Perkins Caufield & Byers	107
McCowm De Leeuw & Co. Inc.	100
Canaan Partners	97
Institutional Venture Partners	97
U.S. Venture Partners	73
Weiss, Peck & Greer Venture Partners	70

(SF Business Times *"Book of Lists -1999"*)

THE BAY AREA IS AT THE NEXUS OF FINANCE AND HIGH TECHNOLOGY

With the links now being established between traditional financial institutions and information technology firms, the Bay Area remains in the forefront of financial innovation.

Nearly all of the major new developments in this industry are being pioneered by Bay Area companies, including:

- *On-line banking*
- *Electronic commerce*
- *Specialized financial software*
- *Electronic distribution of services*

With the ***highest concentration of Internet users in the country***, this region is likely to be among the first experiencing widespread use of electronic commerce.

99 00709
(8)

BAY AREA
MARKETING
PARTNERSHIP
THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

Key Industries:
BUSINESS INCUBATORS

The Bay Area is home to more than 20 business incubators targeting specific high-tech industries such as ***information technology, communications, biotechnology***, and ***environmental technology***, as well as micro-enterprise incubators offering assistance in ***economic self-reliance***.

Business incubators nurture start-up companies, helping them survive and grow when they are most vulnerable. Incubation programs are especially important to the region's entrepreneurs because they provide:

- *Access to value-added resources and networks not typically available to start-ups*
- *Flexible operating environments adaptable to the needs of emerging companies*
- *Direct management assistance*
- *Critical business and technical support services*

Incubators also provide:

- *Shared administrative services*
- *Access to equipment*
- *Flexible leases and expandable space*

An incubation program's primary goal is to produce financially viable and freestanding businesses, usually within two to three years.

- *The strongest existing concentration of business incubators is currently in downtown San Jose.*
- *New incubators are blooming in Oakland and Alameda and Contra Costa counties.*
- *Various San Francisco partners are developing facilities to support digital technology and multimedia firms.*

In the Bay Area, two distinct models of business incubators have flourished:

- *Technology/industry incubators* target entrepreneurs with specialized knowledge and unlimited growth expectations.
- *Micro-enterprise/empowerment incubators* target low-income, minority or women entrepreneurs, local residents, or workers displaced from military bases.

EXISTING AND PROPOSED BUSINESS INCUBATORS IN THE BAY AREA

Information Technology	**The Enterprise Network/ NASA Ames Technology Commercialization Center,** (408) 557-6700 **Alameda Center for Excellence,** (510) 522-0414
Multimedia/ Internet	**Incubator, Inc.,** (510) 848-6048 **San Francisco New Media Campus/Epicenter,** (415) 364-1795 **Women's Technology Cluster,** (415) 664-3169
Software	**Contra Costa Software Business Incubator,** (925) 681-1855 **Software Business Cluster,** (408) 535-2701
Telecommunications	**Communications Technology Cluster,** (510) 836-8985
Bioscience	**VanMed V, Inc.,** (650) 286-2999
Environmental	**ACET: Alameda Center for Environmental Technology,** (510) 749-3977 **Environmental Business Cluster,** (408) 938-3920
Advanced Transportation	**CALSTART Project Hatchery Alameda,** (510) 864-3000
Distribution	**Added Value Cyberenterprises Storage Centers,** (800) 532-1492
Arts	**San Jose Arts Incubator,** (408) 277-2790
Foreign Investment	**International Business Incubator,** (408) 288-6120
Venture Capital	**Frontier Ventures,** (650) 638-1222
Nonprofit	**Tides Center,** (415) 561-6300
Microenterprise	**Center for Entrepreneurial Development,** (408) 971-8061 **Daly City Business Center,** (650) 757-2060 **Marin City Enterprise Center,** (415) 332-6731 **Oakland Small Business Growth Center,** (510) 553-0675 **San Francisco Renaissance Micro Business Incubator,** (415) 541-8580 **Workers to Business Owners Program,** (510) 864-3152
Proposed	**Oakland Army Base,** (510) 238-7907 **Tri-Valley Technology Enterprise Center** **Contra Costa Bioscience Business Incubator,** (925) 681-3266

For more information on regional business incubation opportunities, contact the Pacific Incubation Network at (408) 367-6134, or access the National Business Incubator Association at http://www.nbia.org.

99 00704
(9)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

THE BAY AREA IS A MAJOR EXPORT CENTER

The San Francisco Bay Area is the leading global source for *cutting-edge technologies*—offering businesses around the world the products they need to stay ahead of the competition.

The Bay Area ranks near the top of all U.S. regions in export growth. In 1997, the region exported ***$50 billion*** in merchandise to foreign markets. ***Forty-five percent of total California exports*** are from the Bay Area.

In 1996, San Jose (Silicon Valley) became the top exporting metro area in the country, with exports totalling more than ***$29 billion*** and a ***growth rate of 80%*** from 1993–1997.

THE BAY AREA HELPS COMPANIES ENTER GLOBAL MARKETS

The San Francisco Bay Area is one of only a few regions in the United States with ***integrated and seamless export development services***. Under the Bay Area Economic Forum's BAYTRADE Alliance, six international trade centers provide export consulting services and overseas market connections to help area businesses stay competitive in today's global marketplace. ***TradePort™***, at http://tradeport.org, offers the nation's leading website for online trade information—from export tutorials to market research—in all, more than four gigabytes of information.

TOP MARKETS FOR THE BAY AREA

Japan
Canada
Singapore
Taiwan
South Korea
United Kingdom
Hong Kong
Germany
Netherlands
Mexico

Log on to http://tradeport.org for the location of the region's six international trade centers

The Bay Area Offers the Finest Products and Services to the World Marketplace

- *Agriculture, Wines, Processed Foods*
- *Apparel*
- *Chemical/Petroleum Products*
- *Consumer Products*
- *Engineering/Consulting/Construction Services*
- *Environmental Services/Technologies*
- *Finance and Banking Services*
- *Information and Communication Technologies, including Computer Software and Networking*
- *Medical Technologies/Services*
- *Precision Instrumentation/Measuring Equipment*
- *Sports and Leisure/"California Lifestyle" Products*
- *Transportation Equipment/Products*

The Bay Area Has Ties to the World

The Bay Area is one of the most ethnically diverse regions in the United States. It is proud of its rich culture, which:

- *Attracts the best and the brightest ideas and people from around the world*
- *Strengthens the region's global leadership*
- *Provides a comfortable environment for businesspeople from all countries*

99 00700
(10)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

THE BAY AREA IS A LEADER IN RESEARCH & DEVELOPMENT

The San Francisco Bay Area's *innovative, knowledge-based economy* is driven by an extensive research and development infrastructure.

- *The extraordinary competitive strength, technological and scientific leadership, and innovative character of the region's economy are linked to the Bay Area's R&D infrastructure (research universities, national research laboratories, and private industry).*

- *The Bay Area is home to ten renowned research institutions and numerous private sector companies with major commitments to research. Their combined achievements have benefited the economy, health, and quality of life of the region, the country, and the world.*

This geographical concentration of research institutions and private industry:

- *Results in a critical mass of highly educated and creative people who continually stimulate the economy through their work in federal and industry laboratories or by starting new companies and even new industries.*

- *Attracts knowledge-based companies to locate here and venture capitalists to invest in entrepreneurial start-ups. (The Bay Area accounts for 35 percent of all the venture capital invested in the U.S.)*

WORLD-RENOWNED RESEARCH INSTITUTIONS

Stanford University
University of California, Berkeley
University of California, San Francisco
University of California, Davis
NASA Ames Research Center
Ernest Orlando Lawrence Berkeley National Laboratory
Lawrence Livermore National Laboratory
Sandia National Laboratories
Stanford Linear Accelerator Center
SRI International

LEVERAGING PUBLIC AND PRIVATE R & D INVESTMENT

The region has been the site of immense investment by federal and state governments in the development of advanced research facilities. That investment has been matched by a massive development of R&D facilities by the private sector. The region's major research companies include:

- **Xerox Palo Alto Research Center**
- **Hewlett-Packard**
- **IBM (Almaden Research Center and other labs in San Jose)**
- **Lockheed-Martin**
- **Sun Microsystems**

The region also has the nation's largest concentration of private sector bioscience research firms, including:

- **Genentech**
- **Chiron**
- **Bayer**
- **Roche Bioscience**
- **Alza**
- **Gilead Sciences**

The excellence of Bay Area research institutions is not only a primary attraction to private industry to locate in the region, it is also a key incentive for industry to commit major resources to their businesses here.

This information is taken from a March 1999 report by the Bay Area Economic Forum - *The Bay Area's Research Institutions, How an Extensive Research and Development Infrastructure Drives the Region's Innovative, Knowledge-Based Economy.*

99 00709
(11)

BAY AREA
MARKETING
PARTNERSHIP
THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

THE BAY AREA'S QUALITY OF LIFE MAY BE UNPARALLELED

The San Francisco Bay Area attracts . . .
exceptional people (and the companies they own or work for) because it is an exceptional place to live.

The Bay Area is noted for its:

MEDITERRANEAN CLIMATE AND SCENIC BEAUTY

- *Ideal climate warmed by the sun and cooled by the ocean.*
- *Impressive beauty of the rugged coastline, expansive bay, rolling hills and coastal forests.*

ABUNDANT OPEN SPACE

- *Only 18% of the Bay Area's land is urbanized.*
- *The Golden Gate National Recreation Area (GGNRA) has special appeal:*
  - *World's largest urban national park*
  - *28 miles of coastline through three counties*
  - *Encompasses more than 76,500 acres*
  - *Historic landmarks and breathtaking scenery*
  - *Attracts 20 million visitors annually.*

This region is a virtual haven for those who love the great outdoors. Golfing, tennis, sailing, ocean kayaking, windsurfing, skiing or mountain biking along trails with spectacular vistas . . . the Bay Area has it all.

CULTURAL RESOURCES

The region offers extraordinary cultural resources. Particularly notable:

Major Performing Arts

San Francisco is one of a handful of cities in the world with internationally recognized resident companies in all the major performing arts:

- *San Francisco Opera*
- *San Francisco Symphony*
- *San Francisco Ballet*
- *American Conservatory Theater.*

And there are excellent symphonies throughout the region, including Contra Costa, Napa and Marin Counties, and the Cities of Oakland and San Jose. In addition, numerous community theater groups, ballet companies, art shows, musical productions and annual celebrations highlight the region's wealth of cultural and ethnic diversity.

Fine Arts and Technology Museums

San Francisco:

- *deYoung Museum*
- *Asian Art Museum, with the largest collection outside of Asia*
- *California Palace of the Legion of Honor*
- *San Francisco Museum of Modern Art*
- *San Francisco's Exploratorium*

Oakland/Berkeley:

- *Oakland Museum of California, the only museum devoted entirely to the environment, history and art of California*
- *Lawrence Hall of Science*
- *Chabot Observatory and Science Center*

San Jose/Silicon Valley:

- *The San Jose Museum of Art*
- *Children's Discovery Museum*
- *Tech Museum of Innovation*

Stanford:

- *The Cantor Arts Center at Stanford University includes 24 galleries and the famed Rodin Sculpture Garden.*

Other interesting museums are found throughout the region, including: Marin's Museum of the American Indian, and Mission San Rafael Archangel; Contra Costa's Behring Auto Museum; and San Mateo's Hiller Aviation Museum and Center for the American Musical.

Fine Dining

The region is famous for its many *fine restaurants*, lively bistros, and ethnic eating places. San Francisco alone has more than 3,200 restaurants offering a world of cuisine.

Major League Sports

- *Football (San Francisco '49ers and the Oakland Raiders)*
- *Baseball (Oakland A's and San Francisco Giants)*
- *Basketball (Golden State Warriors)*
- *Hockey (San Jose Sharks).*

Family Recreation

- *Vallejo's Six Flags Marine World, and Santa Clara's Paramount's Great America*
- *The Oakland and San Francisco Zoos*
- *Napa Valley's Hot Air Balloons and Wine Train*
- *San Mateo's Ano Nuevo State Reserve, the world-renowned mainland breeding ground for elephant seals*
- *Numerous county/regional/state parks and beaches.*

99 00709
(12)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

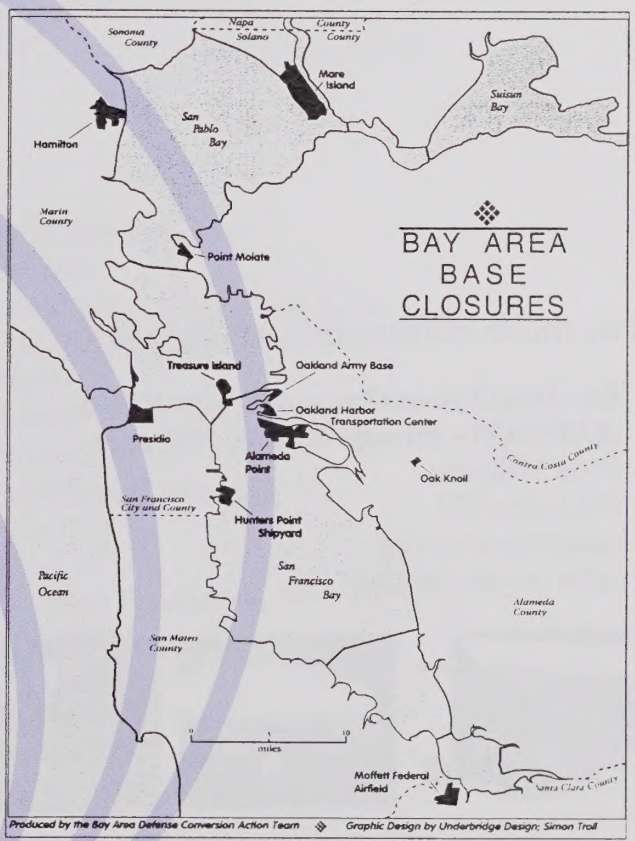
Undiscovered gems:
LEASING AND DEVELOPMENT OPPORTUNITIES AT SAN FRANCISCO BAY AREA FORMER MILITARY BASES

Access, Amenities and Affordability

- Nearly 11,000 acres of prime real estate at 13 sites in the heart of the Bay Area
- Scenic waterfront locations
- Adaptive reuse of buildings and new construction underway
- Freeways nearby, international airports within 10-40 minutes, rail lines on site, expanding ferry service

Unique Growth Opportunities

- Business parks and incubators
- Offices
- Movie and television production
- R&D
- Industrial and light industrial
- Campus and classrooms
- Conferences and events
- Retail
- Residential



For specifics on available sites:

ALAMEDA POINT
ALAMEDA REUSE & REDEVELOPMENT AUTHORITY
Ed Levine, Ken Bowman,
Mike Hampen
(510) 864-3400

FISC ALAMEDA
CITY OF ALAMEDA
Jeff Bond
(510) 749-5808

FORT BAKER
NATIONAL PARK SERVICE
Ron Golem
(415) 561-4429

HAMILTON
ORION PARTNERS, LTD.
Haden Ongaro
(415) 472-8713
CITY OF NOVATO/ROBERT VINE, WILLIAM FROST & ASSOCIATES
Ken Bell
(949) 855-5738

HUNTERS POINT SHIPYARD
SAN FRANCISCO REDEVELOPMENT AGENCY
June Bartholomew,
Barbara Amato, Kevin Warner
(415) 749-2400

MARE ISLAND
CITY OF VALLEJO
Annette Taylor,
Gil Hollingsworth
(707) 648-4444
CB RICHARD ELLIS
Rick Kimball
(510) 874-1910
Shap Roder
(707) 562-3555

MOFFETT FIELD
(Ames Research Complex)
MOFFETT DEVELOPMENT & MARKETING GROUP
Carl Honaker
(650) 604-4967
Donald James
(650) 604-3790

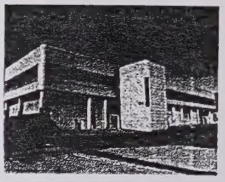
OAK KNOLL
OAKLAND ARMY BASE
OAKLAND BASE REUSE AUTHORITY
Dwayne Oslund
(510) 238-2074
Alisa Gallo
(510) 238-6427

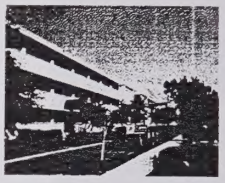
OAKLAND HARBOR TRANSPORTATION CENTER
PORT OF OAKLAND
Jim Putz
(510) 272-1464

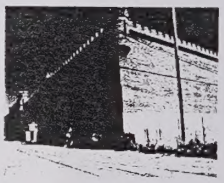
POINT MOLATE
CITY OF RICHMOND
Sunjay Nair
(510) 307-8157
Alan Wolken
(510) 307-8140

PRESIDIO
PRESIDIO TRUST
John Aguilar,
Jane Blackstone
(415) 561-5300

TREASURE ISLAND
TREASURE ISLAND DEVELOPMENT AUTHORITY
Annemarie Conroy,
Daniel Hwang
(415) 274-0660



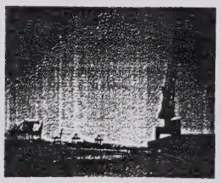




For more information on the region:

BAY AREA DEFENSE CONVERSION ACTION TEAM (BADCAT) — *through May 31, 1999 only*
Keira Williams
(510) 628-8330
badcat@badcat.org
cedar.ca.gov/badcat/

BAY AREA MARKETING PARTNERSHIP
Sally DiDomenico
(415) 981-7117
sdidomenico@baef.baytrade.org
www.bayareafirst.org



99 00709
(13)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

BAY AREA DEMOGRAPHICS

The nine-county San Francisco Bay Area represents *one of the world's great regional economies.*

It successfully competes in the global market as *a knowledge-based economy* powered by its wealth of research, technology, and innovation.

If the Bay Area were a country its economy would rank about 20th in the world.

Gross Regional Product:	Exceeds $200 billion – ranks fifth in the United States
Population:	More than 6.5 million, with three metropolitan centers: San Francisco, San Jose and Oakland
Per Capita Income:	$24,374
Household Income:	$66,900
Avg. Labor Force Supply:	3,250,900
Occupations:	More than 1/3 in managerial, professional or technical operations. Region is in top ranking nationally for its proportion of scientists, lawyers, computer programmers, musicians, engineers, business consultants, authors, physicians and artists
Unemployment rate:	3.8%
Major Industries:	Computers and Electronics Telecommunications Bioscience/Biotechnology/Health Service Banking and Financial Services Business Services Visitor and Tourism Retail and Wholesale Trade Agribusiness and Food Processing
Emerging Industries:	Multimedia Movie and Television Production Environmental Technology

International Airports:	San Francisco Oakland San Jose
International Seaports:	Oakland San Francisco
Specialized Cargo Ports:	Richmond Redwood City Alameda Benicia
Interstate Highways:	I-5, 80, 280, 380, 580, 680, 780, 880 980
U.S. Highways:	101
Leasing Rates: (Office, Industrial and Warehouse)	See individual county profiles on the Partnership website for localized leasing ranges: www.bayareafirst.org
Housing:	See individual city costs in the Partnership website's Quality of Life section—Housing: www.bayareafirst.org
Cultural/Recreation:	The Bay Area offers a uniquely rich array of cultural and recreation opportunities. (See the *Quality of Life* insert sheet.)

Fortune 500 companies: (publicly traded)

APL Limited	McKesson
Apple Computer	Oracle
Applied Materials	PG&E
BankAmerica	Quantum
CNF Transportation	Safeway
Chevron	Silicon Graphics
Cisco Systems	Solectron
The Gap	Sun Microsystems
Hewlett-Packard	TransAmerica
Intel	Wells Fargo

99 00709
(174)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

BAY AREA MARKETING PARTNERSHIP

The Bay Area Marketing Partnership (BayMark), a region-wide, public-private partnership, markets the $200 billion knowledge-based economy of the San Francisco Bay Area. Its primary mission is to increase and sustain the recognition of the Bay Area globally as a ***premier place to do business***.

BayMark assists businesses to expand or locate in the nine-county Bay Area, by providing:

- ***Regional information on the combined strengths of the nine counties.***
- ***A central point of contact for businesses and other entities interested in the San Francisco Bay Area.***
- ***Contact information for the economic development directors of the nine counties and Silicon Valley.***

BayMark presents the comptetitive advantages of the Bay Area through:

- ***Regional brochure and print materials***
- ***Regional website:*** *www.bayareafirst.org*
- ***Regional e-mail newsletter on issues impacting the region's business climate*** *(effective June 1, 1999)*

CONTACT THE PARTNERSHIP FOR DETAILED INFORMATION:

Sally DiDomenico
Bay Area Economic Forum
Phone: (415) 981-7117
Fax: (415) 981-6408
Email: info@bayareafirst.org

See the unique, individual strengths of each of the nine counties, as outlined on the reverse side of this page.

The Diversity of the Bay Area's Nine Distinctive Counties is the Ultimate Source of the Region's Economic Strength

Alameda

The region's most diverse industrial base, spanning the range from traditional manufacturing and food processing to high tech and biotech. Includes the City of Oakland, with the region's busiest seaport, an international airport with excellent cargo facilities, and a fast-growing base of corporate headquarters and office activities. *www.edab.org*

Contra Costa

A relatively new and thriving commercial center with major suburban office parks and a highly diverse economy. Strategically located on major transportation corridors, Contra Costa has attracted much of the area's recent growth in telecommunications, software, biotech and health care. *www.co.contra-costa.ca.us*

Marin

The most affluent Bay Area county, with an economy dominated by small and mid-sized businesses, many in technical fields, environmental and pharmaceutical fields, as well as in retailing. One of the nation's highest concentrations of software companies and multimedia companies.

www.marin.org

Napa

While renowned for being the center of the U.S. premium wine industry, and one of the region's key tourist attractions, Napa is also an active site for a variety of manufacturers. Specialty foods, medical products, pharmaceuticals, marine products and consumer goods. Companies are attracted by the area's lifestyle and variety of industrial and corporate parks and services.

www.nvedc.org

City and County of San Francisco

Leads the region as a financial center, a headquarters location for major corporations, a magnet for tourists and conventions, and a cultural center. San Francisco is the hub of Bay Area design, film, fashion, accounting, consulting and advertising activities. *www.sfp.org*

San Mateo

A diverse economy with special strengths in biotechnology, communications and transportation in north county; electronics, agriculture, and finance in the south. Location of San Francisco International Airport and the venture capital center of the region.

www.samceda.org

Silicon Valley/Santa Clara

Silicon Valley, encompassing all of Santa Clara county and parts of the surrounding counties, has been the epicenter for the technological boom that has occurred over the past two decades. Silicon Valley's innovative and entrepreneurial spirits lead the world in the evolution of the new economy. Santa Clara has a strong and diverse base of services and suppliers supporting the various technological industries. Santa Clara County encompasses San Jose, California's third-largest city, a metropolitan center including a diverse mix of financial and technological firms.

www.jointventure.org

Solano

The affordable Bay Area alternative with modern infrastructure and a skilled and available labor force. A diversified economic base in manufacturing, including biotech, data processing, food processing and distribution. A rich agricultural region connecting the Napa and Sacramento Valleys.

www.SEDCORP.org

Sonoma

Has a diverse manufacturing base in consumer products, telecommunications, information technology and specialized industrial goods. It is also a key producer of wine and agricultural products and a popular tourist destination. With its substantial open land, moderate cost of living and extensive business parks, Sonoma is an important growth area for innovative small and medium-sized business and major corporations seeking expansion sites.

99 00709
(15)

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION · SAN FRANCISCO
OAKLAND · SAN JOSE · SILICON VALLEY

REGIONAL ORGANIZATIONS FOCUSED ON THE BAY AREA'S BUSINESS CLIMATE

Bay Area Economic Forum (BAEF): a public-private regional partnership of business, government, academic, labor and community leaders which develops and implements programs to strengthen the region's competitive economy and quality of life.

Created in 1988 through a partnership of the Bay Area Council and the Association of Bay Area Governments, the Forum's current focus includes:

- *Research and development infrastructure*
- *Digital, telecommunications and multimedia industries*
- *International trade*
- *Regional marketing (the Bay Area Marketing Partnership)*
- *Water transit*
- *Former military base conversion*

For descriptions of programs and publications go to www.bayeconfor.org.

Bay Area Council: a business-sponsored, CEO-led public policy organization founded more than 50 years ago to promote regional economic prosperity and quality of life. Provides a strong, united voice for business leaders and major employers while promoting public policy that respects private sector innovation and entrepreneurism in order to enhance the region's comparative economic advantage. Acts on issues related to:

- *Transportation*
- *Environmental quality*
- *Sustainable economic development*
- *Housing and land use*
- *Water policy*
- *Education and workforce preparation*
- *Telecommunications infrastructure*

For more information, go to: www.bayareacouncil.org.

Association of Bay Area Governments (ABAG): a partnership of nine counties and 98 cities created to provide innovative solutions and cost-effective services for local governments.

ABAG is the regional planning agency for the cities and counties in the San Francisco metropolitan area—and is increasingly involved in business-oriented entrepreneurial services, including:

- *Job and Population Forecasts—Projections reports*
- *Electricity and Natural Gas Purchasing—ABAG POWER*
- *Earthquake Preparedness—Transportation and Housing Impacts*
- *Green Business—Certification for best practices*
- *Bond Issuances—Financial services to fund capital projects*
- *Municipal Liability Insurance—For Bay Area cities*
- *Worker's Compensation Administration—For local governments*

For more information, go to http://www.abag.ca.gov *or call (510) 464-7900*

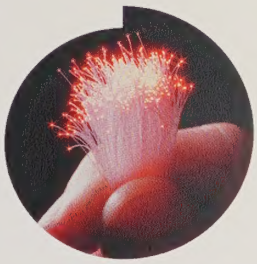
99 80709

INSTITUTE OF GOVERNMENTAL
STUDIES LIBRARY
MAY 7 1999

Great Thinking, Great Living, Great Place to do Business

NINE-COUNTY REGION San Francisco—Oakland—San Jose—Silicon Valley

Alameda-Contra Costa-Marin-Napa-San Francisco-San Mateo-Santa Clara-Solano-Sonoma



The San Francisco Bay Area thrives on its highly-educated, exceptionally skilled population, and unparalleled culture of creativity.

There's a synergy here that stimulates innovative thinking, *that encourages entrepreneurs to turn a concept into a corporation or transform an idea into an industry.*

The region plays a major role in the technological and economic leadership of the nation.

World-class research universities and national research laboratories team with business to achieve a steady stream of technological advances.

The Bay Area thinks globally.

It leads other regions in California and the nation in the value of its exports, *and the attraction of investment in research and manufacturing from around the world.*

The region provides unparalleled cultural and recreational resources:

fine arts museums, internationally recognized companies in the performing arts; and outstanding major league sports teams in *football, baseball, basketball, and hockey.*

And the region presents the breathtaking beauty of a rugged coastline, stately forests, towering mountains and abundant open space, including the spectacular 76,500 acre Golden Gate National Recreation Area.

It's a dynamic setting for a dynamic economy.

BAY AREA
MARKETING
PARTNERSHIP

THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

U.C. BERKELEY LIBRARIES
C124921069

The 9 County Bay Area

KEY

- Computers & Related Electronics
- Telecommunications
- Multimedia
- Movie & Television
- Bioscience, Healthcare & Technologies
- Banking & Finance
- Environmental Technology
- Agriculture
- Visitors & Tourism
- Open Space
- Fine Restaurants
- Cultural Resources
- Research Laboratories, Universities, & Institutions
- International Airports
- International Seaports

BAY AREA
MARKETING
PARTNERSHIP
THE SAN FRANCISCO BAY AREA
NINE COUNTY REGION • SAN FRANCISCO
OAKLAND • SAN JOSE • SILICON VALLEY

200 Pine Street, Suite 300
San Francisco, CA 94104

Phone: (415) 981-7117
Fax: (415) 981-6408
E-mail: info@bayareafirst.org
Website: http://www.bayareafirst.org

A Program of The Bay Area Economic Forum

DESIGN: DENNIS MOSES DESIGN/OAKLAND, CALIFORNIA